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Developing an Onboarding Program to Improve Senior Leader Transitions in the Army

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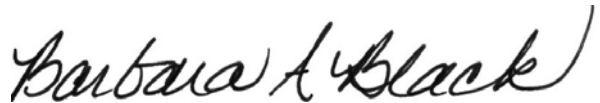
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August 2009

**U.S. Army Research Institute
for the Behavioral and Social Sciences**

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14. ABSTRACT *(Maximum 200 words)*: The U.S. Army has long had an institutionalized form of personnel rotation among its leaders. As such, a large amount of senior leadership time is spent learning unfamiliar organizational culture, adjusting to new roles, and developing new critical networks of relationships needed to command effectively. Presently, much of this happens in a relatively non-systematic fashion, sometimes resulting in inefficiencies and preventable mistakes. The purpose of this paper is to discuss the difficulties that accompany senior leadership transitions and propose onboarding as a solution to help military leaders and organizations deal with these challenges. Drawing from best practices developed in the civilian sector, this paper describes a hypothetical Army onboarding program in order to illustrate the concepts and principles associated with it. It includes recommendations for tailoring a senior leader onboarding program to the particular requirements of an individual command. Although a number of the issues presented in this paper likely apply to many military settings, they are discussed and illustrated here in the context of U.S. Army leaders who are responsible for overseeing support staff in an office-type (e.g., headquarters) environment.

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DEVELOPING AN ONBOARDING PROGRAM TO IMPROVE SENIOR LEADER
TRANSITIONS IN THE ARMY

EXECUTIVE SUMMARY

Research Requirement:

Army leaders transition into and out of commands on a regular basis. As a function of
these regular command rotations, senior Army leaders spend much of their time learning
organizational culture, adjusting to new roles, and developing critical networks of relationships
needed to command effectively and make an impact. Presently, much of this happens in a non-
systematic fashion or is left to chance, sometimes resulting in inefficiencies and preventable
mistakes. The purpose of this report is to discuss the difficulties that accompany senior
leadership transitions and to propose onboarding as a solution to help military leaders and
organizations deal with these challenges.

Procedure:

Drawing from best practices developed in the civilian sector, this report describes a
hypothetical Army onboarding program in order to illustrate the concepts, principles, and best
practices associated with it. The wholesale adoption of this example program is discouraged in
favor of a customized approach in which the unique characteristics and needs of a given
command are considered prior to determining precisely what an onboarding program for that
organization should entail.

Utilization and Dissemination of Findings:

Although a number of the issues presented in this paper likely apply to many military
settings, they are discussed and illustrated here for U.S. Army leaders who are responsible for
overseeing support staff in an office-type (e.g., headquarters) environment and contribute to the
development and utilization of onboarding in similar military and non-military contexts. The
report offers near-term recommendations for tailoring a senior leader onboarding program to the
requirements for effective leadership and learning the organization's mission, services,
technologies, systems, structures, culture, and politics. Recommendations are based on the
premise that *the organization* is in a much better position than the incoming leader is to make
systematic and focused decisions about what needs to be learned and immediately. The report
concludes that onboarding enables senior leaders to execute their duties effectively by directing
them, early on, to the types of information and relationships that will help them get off to a
strong start, avoid missteps typical of new leaders facing new challenges, and accelerate the
transition.

More specifically, the senior leader onboarding program presented in this report is
designed to speed up the learning curve and reduce the amount of time it takes incoming senior
leaders to acclimate and become fully productive members of their newly assigned organization.
Beyond in-processing and orientation, it is a developmentally-oriented mechanism to quickly and

effectively transition senior leaders into the organization by providing assistance with network development, cultural integration, and leadership development, rather than relying on a more reactive or casual process.

DEVELOPING AN ONBOARDING PROGRAM TO IMPROVE SENIOR LEADER
TRANSITIONS IN THE ARMY

CONTENTS

DEVELOPING AN ONBOARDING PROGRAM TO IMPROVE SENIOR LEADER
TRANSITIONS IN THE ARMY

Introduction

The U.S. Army has long had an institutionalized form of personnel rotation (Turney &
Cohen, 1978), which applies not only to junior-level personnel but to advanced Non-
Commissioned Officers (NCO) and officers as well. As a result, senior leaders transition in and
out of Army commands on a regular basis. From an organizational standpoint, a large amount of
senior leadership time is spent learning the organizational culture, adjusting to the new role, and
developing the critical networks of relationships needed to make an impact. Presently, much of
this happens in a relatively non-systematic, hit-or-miss fashion. A great deal is left to chance,
resulting in inefficiencies and preventable mistakes.

The purpose of this paper is to discuss the difficulties that accompany senior leadership
transitions, propose onboarding as a solution to help military leaders and organizations deal with
these challenges, and offer near-term recommendations for moving forward with the
development of a U.S. Army senior leader onboarding program. Although a number of the
issues presented in this paper apply to many military settings, they are discussed and illustrated
here in the context of U.S. Army leaders who are responsible for overseeing support staff in an
office-type (e.g., headquarters) environment.

Transition Challenges

Transitioning into a new role poses challenges, even for seasoned leaders. These
challenges have prompted some to argue that the Army needs to pay closer attention to how
organizations outside of the military successfully deal with leadership rotations. The literature is
replete with case studies describing how private and public sector organizations help integrate
incoming Chief Executive Officers and other senior leaders into their new roles (e.g., Bayer,
2004; Conger & Fishel, 2007; Wells, 2005). Even newly elected U.S. presidents have transition
specialists charged with helping their incoming administration overcome what is often viewed a
"…unfortunate mix of arrogance and ignorance" (Barnes, Eggen, & Kornblut, 2008) that can
limit an administration's effectiveness early on. Yet, despite the attention paid to senior leader
onboarding in other domains, the U.S. Army, whose leadership transitions occur on a regular
basis, places little emphasis on helping incoming senior leaders deal with the challenges that
accompany role transitions.

Steep Learning Curve

It is recognized that senior leaders selected for U.S. Army assignments are exceptionally
skilled professionals. Nevertheless, all incoming senior leaders go through a learning curve
during which they are net consumers of value, drawing resources from the organization while
performing below the level of a fully productive leader (Snell, 2006). This state of affairs
contributes to what has come to be known as "…the breakeven point" (Daly & Watkins, 2006;
Watkins, 2003). As Daly and Watkins (2006) state, "The breakeven point is the point at which
new leaders have contributed as much value to their new organization as they have consumed

from it … new leaders are net consumers of value early on; as they learn and begin to take action, they begin to create value. From the breakeven point onward, they are (one hopes) net contributors of value to their organizations" (pp. 8-9). In government, the length of successful transition periods is believed to vary widely (Daly & Watkins, 2006). In the private sector, research suggests that it takes a mid-senior-level manager about 6 months, on average, to reach the breakeven point (Watkins, 2003; Wells, 2005). This is noteworthy, considering that senior leaders in some Army commands rotate out of their positions after 12-18 months as a matter of course with others rotating to a new assignment after as few as six months on the job (M. Bodoh, personal communication, July 14, 2008).

Importantly, the amount of time it takes senior leaders to reach the breakeven point is not solely contingent on the a priori leadership skills with which they arrive. It is also a function of the amount of time it takes them to grasp the new organization's inner workings, contextual structure, decision-making processes, priorities, programs, systems, key players, and culture (Fritz & Vonderfecht, 2007). Upon arrival, senior leaders' knowledge of their new organization is inevitably incomplete, thereby limiting their ability to produce value. As described next, effectiveness early on is limited due to unknowns pertaining to the new leadership role, an unfamiliar organizational culture, and an undeveloped professional network.

A New Leadership Role

In many cases, senior leaders are rotated into leadership roles that are quite different from the ones they have performed in the past. Consider, for example, an officer coming out of the field, into an office-type (e.g., headquarters) environment. Such an environment has unique features. Managing civilians and working with contractors are but two examples of how an incoming officer's role can differ from prior leadership assignments. In light of these and other key differences, it is unwise to assume that the behaviors and techniques which made the leader successful in the field will automatically work at the headquarters organization.

An Unfamiliar Organizational Culture

Organizational culture comprises the shared values (what's important) and beliefs (how things work) that produce behavioral norms (the way we do things around here) (Uttal, 1983). "Culture trumps strategy" has become a well-known maxim (Clark & Krentz, 2006) suggesting that an otherwise sound leadership initiative will fail when it conflicts with an organization's culture. Although the Army undoubtedly has a distinct culture, many subcultures exist within this overarching framework. As such, a move from one Army command to another may entail a culture shift. For example, as suggested above, a headquarters organization may be characterized by a blended culture composed of military and civilian, full-time and contract personnel operating side-by-side. This unique culture may be unfamiliar to incoming leaders, and quite different from other Army cultures they have worked in previously. Unfortunately, it is common for an incoming senior leader to make the mistake of accidentally working against the established culture (McCarthy, 2005). Training programs and tools such as the Officer Basic Course, the Army Officer's Guide (Bonn, 2002), and the Enlisted Soldier's Guide (Rush, 2006) are provided to help new leaders understand Army culture *generally* (Reger et al., 2008). However, no system is currently in place to help incoming senior leaders grasp the nuances of

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the particular Army culture to which they have been newly assigned. As a result, culturally-informed decision making is nearly impossible during the initial days of a new leadership assignment.

An Undeveloped Professional Network

A well-developed network of professional relationships is essential to effective Army leadership. If one were to apply network modeling to Army organizations, the impact of transitions on leadership networks would become abundantly clear. Colonel Thomas X. Hammes (2006) underscores this point, stating that:

> *"When we chart an organization hierarchically, it appears that our personnel rotation policies have minimal effect on our organizations. One individual leaves, and another qualified individual immediately fills that line on the organization chart; there is no visual indication of the impact on our organization. If, however, we plotted our own organizations as networks, we could see the massive damage our personnel rotation policies cause. When a person arrives in [a new job], for some time he probably knows only the person he is working for and a few people in his office. In a network, he will show up as a small node with few connections. As time passes, he makes new connections ... On a network map, we will see him growing from a tiny node to a major hub ... Just as clearly, when he rotates we will see that large hub instantaneously replaced by a small node with few connections"* (pp. 22-23).

Of whom an incoming senior leader's network should consist depends on the particular role to which that individual has been assigned. It takes time for a senior leader to figure out who this network should comprise, and it takes even more time to cultivate the relationships needed to leverage the network for leadership success. Until this network is firmly established, effectiveness is necessarily limited.

Prior Leadership Training and Experience Alone are Insufficient

It is recognized that incoming senior leaders are well-seasoned, arriving with many years of Army leadership experience and training under their belts. However, prior experience alone does not completely prepare individuals for a new role, which is commonly accompanied by a different set of responsibilities in an unfamiliar cultural, structural, social, and political environment. Meanwhile, surprisingly few senior leaders receive any training in how to transition into a new organization efficiently. While the Army has equipped officers with a wealth of courses and readings on various other aspects of leadership, little if any of their prior training addresses directly how to be an effective newcomer – that is, how to diagnose a command, develop professional networks, align strategy with culture, and otherwise acclimate to a new organization upon arrival (Daly & Watkins, 2006; Wells, 2005). While important

readings on these topics have emerged in the private sector[1] and U.S. government[2], no complementary materials exist to guide military leaders transitioning into new commands.

Feedback Deficiency

Many leadership roles in the Army come with high visibility, accountability, role complexity, and stakes. Officers assigned a new leadership position in a headquarters command, for example, may face a number of significant new responsibilities. Paradoxically, this relatively steep jump in one's career trajectory is met with minimal leadership training, feedback, and coaching. Although self-awareness is commonly considered a prerequisite to effective senior leadership (Fritz & Vonderfecht, 2007), developmental feedback and coaching while in the senior leadership role are not commonly available. As Jones (2003, 2004) maintains, junior officers are not the only ones who need feedback and coaching; leadership development is necessary for senior leaders as well, especially when transitioning to a new role. In fact, the argument has been made that the value of leadership development programs increases at higher levels of the military due to increasingly ambiguous and complex challenges and skill requirements (Jones, 2003).

Whereas non-military organizations are known to spend extensive time and resources developing incoming executives (e.g., Conger & Fishel, 2007), senior leaders in the Army receive limited developmental guidance during the transition phase. It is understood that those at the top of the organizational hierarchy (e.g., Commanding General, Chief of Staff) do not have time to coach every incoming senior leader. At the same time, no programs are currently in place for senior leaders to receive feedback and developmental guidance elsewhere. Outside of the military, leaders operating in a feedback-deficient environment are advised to request a 360 assessment if it is not offered (Lewis, 2005). Anecdotally, we have seen Army leaders from O6 to O8 ask to participate in a 360 leader review program, through no prompting on the part of the program coordinators, despite the fact that the feedback tool in question was designed for mid-level leaders lower in the organizational hierarchy. This reinforces the notion that developmental feedback at the senior level is simply hard to come by.

Of course, not every senior-level officer willingly solicits feedback. In fact, many (if not most) incoming senior leaders are unlikely to proactively seek out the guidance they need, which means it is not always wise to passively wait for the leader to ask for feedback. Sometimes, the people who need feedback the most are the ones who are least likely to ask for it. Overconfidence is one barrier to feedback seeking. Years of prior leadership experience can serve as a double-edged sword, producing a "been there, done that" mentality when it comes to transitioning to a new role. Some leaders feel that they can immediately use their old skills in new situations when, as mentioned, what worked in the field may not work elsewhere (e.g., in a

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[1] See, for example:
> Ciampa, D., & Watkins, M. (1999). *Right from the start: Taking charge in a new leadership role*. Boston, MA: Harvard Business School Press.
> Watkins, M. (2003). *The first 90 days: Critical success strategies for new leaders at all levels*. Boston, MA: Harvard Business School Press.

[2] See, for example:
> Daly, P. H., & Watkins, M. (2006). *The first 90 days in government: Critical success strategies for new public managers at all levels*. Boston, MA: Harvard Business School Press.

headquarters environment). This misplaced self-confidence sometimes discourages incoming senior leaders from requesting developmental feedback and from being pro-active in learning (Wells, 2005).

Impression management is another deterrent to feedback-seeking behaviors. Incoming senior leaders often do not want to reveal vulnerability (Wells, 2005). There is a natural desire to appear "in charge" and be seen as an effective leader immediately. Independently soliciting coaching and feedback would dispel this impression; therefore, senior leaders may be hesitant to seek either, even when such information would contribute to the leaders' and the Army's success (Conger & Fishel, 2007).

Political Missteps and Negative Reputations Can Result

During the transition to their new position, the stakes are high for the incoming leader, his/her directorate, and the organization (Marcus, 2008). Unfortunately, senior leaders are not guaranteed to succeed. Some derail, and when they do, their problems can usually be traced to mistakes that developed in the first few months on the job (Watkins, 2003). Leaders who take action in the absence of a solid understanding of the organizational culture, a well-developed network, and/or a clear grasp of the nuances of their new leadership role are prone to political and interpersonal missteps. In the absence of sufficient corrective feedback, such errors can go undetected by the leader for quite some time, though others may see them clearly.

Missteps are particularly problematic when committed early on. The first few months on the job represent a critical time period during which the leader's reputation within the new organization is cemented. Small differences in a leader's early actions can have large disproportionate effects on his/her later success (Daly & Watkins, 2006). Because it is difficult to recover from a negative reputation once established, early mistakes can have lasting ramifications. Rapid and early intervention is required to minimize the occurrence and impact of such mistakes.

Army commands are not immune to the concerns described above. Despite having witnessed considerable leadership success over the years, Army commands, like other organizations, have also experienced senior leadership problems stemming from missteps and negative reputations. In many cases, these incidents involved individuals whose winning track records, which landed them the new position, did not ready them for their new leadership role or environment. Technically competent and accomplished in other areas of leadership, incoming senior leaders may lack the organizational aptitude needed to adapt their behaviors to their new environment. In short, the factors that inhibit a new leader's successful integration often have little to do with technical competence and leadership experience. Other factors, such as understanding the organization's culture, are paramount (Derven, 2008). Senior leaders need support transitioning to their new roles, no matter how talented and experienced they may be (Johnson, 2006).

Potential Solution: Senior Leader Onboarding

In their book titled "The First 90 Days in Government," Daly and Watkins (2006) summarize the challenges that face new leaders entering a government organization. They stress the importance of learning the organization's mission, services, technologies, systems, structures, culture, and politics, providing the following advice to incoming leaders: "you have to be systematic and focused about deciding what you need to learn and how you will learn it most efficiently" (p. 11).

It can be argued, however, that an incoming senior leader who is unfamiliar with the organization is not in the best position to determine what he/she needs to learn and how. Paradoxically, the very knowledge gaps at issue can prevent the selection of the "systematic and focused" learning agenda that Daly and Watkins (2006) prescribe. Senior leader onboarding, as described below, addresses this concern. It is based on the premise that the organization is in a much better position than the incoming leader is to make systematic and focused decisions about what needs to be learned immediately. Onboarding enables senior leaders to execute their duties effectively by directing them, early on, to the types of information and relationships that will help them get off to a strong start. While it helps senior leaders avoid the types of missteps described above, it is about more than mere failure prevention. A well-designed onboarding program can be expected to help senior leaders reach the breakeven point sooner (Wells, 2005). In this regard, it is a method for transition acceleration.

In short, senior leader onboarding is a program designed to speed up the learning curve and reduce the amount of time it takes incoming senior leaders to acclimate and become fully productive members of their newly assigned organization. Beyond in-processing and orientation, it is a developmentally-oriented mechanism to quickly and effectively transition senior leaders into the organization. By providing assistance with network development, cultural integration, and leadership development (All aboard, 2007; Conger & Fishel, 2007), onboarding allows incoming senior leaders to secure early successes and build supportive alliances, providing a strong foundation for future success. Rather than relying on a more reactive or casual process, an onboarding program proactively orchestrates many aspects of a leader's learning (e.g., cultural knowledge, network development) that are currently left to chance. Also known as "management integration" and "assimilation coaching," onboarding is deemed especially important in large, bureaucratic organizations where getting up to speed otherwise takes a great deal of time for incoming leaders (McGregor, 2007).

Onboarding programs are designed to help senior leaders rapidly acquire an understanding of the organization's environment, socialize them into the organization's culture and politics, help them forge a network of critical relationships, and familiarize them with the operating dynamics of their work groups. In his consideration of senior leader onboarding in the Department of Defense, Bayer (2004) notes that "Successful onboarding programs teach executives the unwritten rules of 'how to get things done'"… allowing the incoming senior leader "…to learn organizational history, culture and strategic priorities; understand business workflow and handoffs in the decision-making process; assess his/her own organization's strengths and abilities … and to become comfortable with the personal challenges of the new position" (pp. 2-3).

While many different descriptions of onboarding exist, most programs focused on senior leadership conceptualize onboarding as a system to help newcomers quickly and efficiently:

- Learn the organizational culture. This entails acquiring an understanding of the written and unwritten norms of behavior within the organization.
- Build critical organizational relationships. This includes identifying and developing the network of relationships needed to lead effectively.
- Master their roles that leadership demands. This involves rapidly determining the organization and directorate's expectations. It also requires developing and adapting leadership behaviors to the organization's culture.

Illustrating Senior Leader Onboarding in the U.S. Army: A Hypothetical Case Study

When considering precisely what an onboarding program should entail, the mantra "one size does not fit all" undoubtedly applies. A pre-packaged onboarding sequence is unlikely to be equally effective across Army organizations because the program components necessary for success depend on the unique needs and so called "pain points" of the organization in question (Onboarding: Hi-tech flying high, 2008). These must be determined through a systematic needs assessment designed to identify the most important knowledge and skills that (a) tend to be absent upon organizational entry, (b) are not provided elsewhere in the incoming senior leader's orientation program, and (c) commonly prevent or slow the rate of senior leader effectiveness. Recommending a fleshed-out onboarding program in this paper would be premature in the absence of an onboarding needs assessment investigating these areas. Guidance for conducting the requisite needs assessment is provided later in this report.

Although designing and recommending a specific onboarding program without a needs assessment is decidedly imprudent, there is value in exemplifying the types of options available. For illustrative purposes, the following pages therefore describe an example onboarding program based on best practices and recommendations found in private- (e.g., Bank of America; Bristol-Meyers Squibb) and public-sector organizations (e.g., Department of Defense) focused on integrating incoming, high-level, senior leaders (e.g., Bayer, 2004; Conger & Fishel, 2007; Wells, 2005). For ease of expression, this example onboarding program is presented as a case study centering on a fictitious Army organization referred to as "HQCOM." The HQCOM can be assumed to be a typical headquarters organization containing a mix of military, civilian, and contract personnel with most of the senior leaders as military (O6) directorate heads.

This hypothetical case study format is utilized in hopes of offering a concrete illustration of the types of activities Army organizations can consider when designing their senior leader onboarding programs. However, this format is not meant to imply that the Army is implementing, will implement, or even should implement onboarding in the exact manner described next. In all likelihood, some Army organizations will not be interested in or able to initiate all of the onboarding exercises described below. For some commands, certain aspects of this example program will be (a) unnecessary, (b) incompatible with the organizational culture, (c) sufficiently covered elsewhere in the incoming senior leader's orientation process, and/or (d) not practical/feasible given the time and resources available. Thus, the example below should not be viewed as a prescription for how onboarding ought to be implemented in every Army

command. Rather, it should be viewed as a sampling of onboarding techniques available – a menu of sorts, from which various Army organizations may wish to draw and adapt when formulating an onboarding program to meet their particular needs. Ultimately, military organizations should shape and mold the ideas discussed when picking and choosing from this menu, in order to formulate onboarding programs which address the specific knowledge and skill gaps uncovered in their needs assessments.

Introduction to HQCOM Onboarding

The hypothetical HQCOM program detailed below portrays onboarding as a systematic, yet non-linear, non-sequential process that requires significant commitment from the entire organization (Bayer, 2004). It occurs over an extended period of time, with the majority of the activities scheduled for the first 90-100 days of one's assignment. This window, sometimes called the "honeymoon period," is an optimal time to instruct and guide senior leaders. The opportunity to effect change is much greater during this period (Onboarding coaches, 2002), as leaders have more latitude for behavior without the baggage that accompanies a reputation, once developed.

The HQCOM's onboarding program includes both standardized and customized components tailored to the needs of the incoming leader. Onboarding is not meant to duplicate or compete with the orientation process currently available to incoming senior leaders. Rather, it is intended to complement, extend, and capitalize on what is currently in place, with the goal of avoiding redundancy and ensuring a cohesive, integrated process which enables synergy between the current orientation and the more extensive onboarding process. As such, useful materials presently included in senior leader orientation at HQCOM are incorporated into the onboarding program and reinforced as appropriate.

Prior to Arrival

The HQCOM onboarding begins prior to the incoming leader's arrival, as soon as he or she is selected for the position. The process commences with the assignment of a leadership transition facilitator to manage the senior leader's entry and assimilation into the organization. As described below, the facilitator also provides coaching as needed to help the leader diagnose difficult transition situations and assess and build the commensurate skill levels. In addition, the facilitator assists the new leader in bolstering the team and achieving alignment with the strategy, structure, and culture (Cashman & Smye, 2007). Throughout the process, the transition facilitator remains in communication with other HQCOM elements currently involved with in-processing and orienting incoming senior leaders (e.g., the HQCOM G-1, G-3, Chief of Staff).

It is important to select experienced facilitators outside the incoming leader's chain of command and directorate who understand HQCOM's culture, have the interpersonal and organizational skills to manage this process, and are available to carry this process out with commitment and rigor each time a new senior leader arrives (Johnson, 2006). An organizational psychologist or organizational development specialist trained in 360 feedback and coaching techniques would be well suited to this role. Our vision of the transition facilitator's duties appears below. However, depending on the nature of the organization, some of the tasks

assigned to the transition facilitator in this report may be effectively accomplished by other individuals, such as the incoming senior leader's deputy, instead. It should be noted that the role, as outlined below, grants the transition facilitator access to sensitive and confidential (e.g., 360 feedback) information about the incoming senior leader. If an organizational peer (perhaps one who is him/herself an alumnus of the onboarding program) is asked to serve as a transition facilitator, then the role outlined below would probably need to be modified to prevent people from gaining access to confidential data that are not intended to be shared among peers.

Before the incoming senior leader arrives on site, the transition facilitator meets with a number of key individuals to gather information. The facilitator holds semi-structured interviews with the incoming senior leader's predecessor (i.e., the outgoing senior leader) and boss. In addition, focus groups involving selected peers and direct reports are conducted. The transition facilitator gathers information on topics such as:

- The job's goals and performance expectations.
- The history of how the role has evolved.
- What major obstacles is this directorate encountering? What opportunities exist?
- Key challenges associated with the senior leader's new role.
- The political dynamics the incoming leader will likely encounter.
- Who does this senior leader need to get to know early on to help him/her do his/her job more effectively?
- Who does he/she need to know to carry out his/her responsibilities?
- From whom will he/she need certain types of information?
- To whom will he/she need to provide information?
- Who within the organizational network has always known how to move projects forward and solve the types of problems he/she may encounter?

The transition facilitator synthesizes the input gathered above, for inclusion in a customized Senior Leader Transition Guide designed to help the incoming leader navigate through the challenges of assimilation. In addition to standardized components (i.e., routine information included in every incoming senior leader's guide), the Senior Leader Transition Guide also contains information tailored to the particular directorate, time period, and environment the leader is joining. Overall, the Guide incorporates critical information about the onboarding process, the directorate, and the organization including:

- A description of the onboarding process (steps, timeline, calendar of upcoming onboarding events, scheduled meetings, etc.).
- A description of the organization's vision, mission, values, and culture.
- A synthesis of the information gleaned from pre-arrival interviews and focus groups conducted with the predecessor, boss, peers, and direct reports.
- Overall and directorate-level results from the most recent command climate survey.
- Recent presentations addressing key issues in the directorate, if available.
- A copy of the outgoing senior leader's (i.e., predecessor's) 12-month calendar for the prior year, if available.

- A contact sheet listing key network members. [Note that the best networks comprise a blend of longstanding and newer personnel, enabling the leader to benefit from seasoned individuals' wisdom and newer leaders' fresh perspectives (Cashman & Smye, 2007; Johnson, 2005).]

Along with the new materials developed for the onboarding program, this Guide also incorporates critical dates and materials from the orientation and in-processing programs currently in place. To facilitate prioritization, reading materials included in the Senior Leader Transition Guide are categorized as "mandatory" or "optional" (Bayer, 2004).

First Two Weeks on the Job

The Senior Leader Transition Guide is placed on the incoming leader's desk when he/she arrives for the first day on the job. It is accompanied by a cover letter from the Chief of Staff signaling support for the process and telling the incoming senior leader to expect contact from a transition facilitator. During the first week on the job, the transition facilitator contacts and meets with the incoming senior leader. The facilitator describes the onboarding process as well as his/her role and expectations. The facilitator then highlights and expands upon informational materials in the Senior Leader Transition Guide, describing the organizational culture, the information gleaned from interviews with key personnel, and so forth. Afterwards, the facilitator engages the senior leader in a discussion of his/her leadership style and asks the leader to briefly describe his/her leadership history. This helps the facilitator understand the incoming leader's mental model of leadership.

It is commonly believed that senior leaders in the Army should seek to be as self-aware as possible to promote their own effectiveness as well as that of their organizations (Jones, 2003). However, as previously discussed, feedback for senior leaders is not readily available most of the time. To mitigate this problem, a 360 leader review process is therefore implemented at the outset of the senior leader onboarding program. The data from this review (a) help identify past leadership behaviors that may not be well-received at HQCOM, and (b) inform the incoming senior leader's goal-setting activities. During the initial meeting with the senior leader, the facilitator introduces the 360 leader review instrument and process used at HQCOM and requests that the incoming senior leader identify peers, subordinates, and a superior from his/her prior organization who may be willing to complete the survey rating his/her leadership behaviors. The incoming senior leader is asked to pass their contact information to the transition facilitator no later than the end of Week 2 on the job.

Weeks Three to Eight

At the beginning of Week 3 on the job, the incoming senior leader's former boss, peers, and direct reports are asked to use a 360 leader review instrument to rate his/her leadership behaviors as demonstrated in the previous assignment. The incoming senior leader is asked to provide self ratings as well. Ratings are anonymous and used for developmental purposes. Only the incoming senior leader and the transition facilitator have access to the data and reports that emerge from this process. The 360 feedback survey was developed specifically for HQCOM, with items based on the organization's leadership competency model. Therefore, this initial 360

leader review serves the dual purpose of promoting self awareness and communicating the organization's definition of effective leadership (via the items in the 360 feedback survey) up front.[3] Once the 360 feedback data are collected and analyzed, the transition facilitator meets again with the incoming senior leader to discuss the results. This meeting opens the door for a conversation about how the incoming senior leader's particular leadership skills and style might apply to his/her new role and this organization. The incoming senior leader is asked to look closely at his/her leadership strengths and limitations and then formulate a development plan outlining goals for improving upon critical areas garnering relatively low ratings. The transition facilitator follows up with the leader at predetermined time points throughout the ensuing months to inquire about progress toward these goals, to answer questions, and to provide support through constructive feedback and coaching.

The transition facilitator contacts key network members prior to the incoming senior leader's arrival in order to ensure that the leader is on their calendars – that is, scheduled to meet with them during his/her first 30 days. This includes meetings with the incoming senior leader's boss as well as other people within the organization who have the technical expertise, cultural knowledge, and/or "political juice" that the incoming senior leader needs to do his/her job effectively. The leader is provided with a recommended list of questions to ask and points to cover during these meetings, at his/her discretion. The meeting with the boss ideally centers on discussing, clarifying, mutually agreeing upon, and writing down priorities and performance expectations. Nailing down what the boss wants, when he/she wants it, and how he/she wants it ensures everyone is on the same page, minimizing performance problems resulting from misinterpreted priorities (Lewis, 2005). If the incoming senior leader has not had the opportunity to work alongside his/her predecessor, this meeting schedule may also include a phone call to or from the former position holder, so that the incoming leader may benefit from his/her predecessor's perspective on the directorate's history, culture, priorities, and "lessons learned."

In addition, leader-team integration exercises are scheduled to occur as soon after arrival as possible – absolutely no later than the 30-60 day window after the leader's first day on site. This provides an opportunity for the senior leader and those working for him/her to become more acquainted with their respective operating styles and expectations. It opens lines of communication and helps establish trust. Giving the incoming senior leader a formal process to meet and spend time getting to know directorate personnel allows the leader to begin to place his/her "signature" on the organization. That is, the leader-team integration session allows the incoming senior leader an opportunity to convey what he/she wants people to know about him/her, communicate messages he/she wants to begin to share, and articulate his/her values and core expectations. At the same time, this meeting allows the leader to listen to and learn from subordinates, who hold valuable information about the organization, the directorate, and the people/systems involved (Fritz & Vonderfecht, 2007). The leader-team integration process involves three steps. First, the transition facilitator meets individually with the senior leader. The facilitator provides an overview of the integration session's objectives and mechanics,

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[3] It is critical that the incoming senior leader sees the organization's definition of effective leadership early on. If the initial 360 process described above is not implemented, then an alternative is to show the competency model and 360 instrument to the leader, gather self ratings, and have the leader set goals based on his/her personal assessment regarding the areas/items believed to be the most challenging for him/her.

identifies the senior leader's objectives for the session, and gauges the incoming leader's interests and concerns via questions such as:

- What do you want to know about your personnel?
- What are your concerns?
- What things are most important to you as a leader?
- What do your personnel need to know about your expectations and operating style?
- What are your "hot buttons?"
- What key messages would you like to send to the personnel?

Second, the transition facilitator meets with directorate personnel as a group (without the senior leader) to develop a preliminary understanding of the group's interests and concerns. Information is solicited through questions[4] such as:

- What don't you know, but would like to know about the incoming senior leader? This can include personal questions (e.g., Where did you go to college? Outside hobbies/interests, etc.).
- What advice do you have for the new senior leader that will help him/her be even more effective?
- What questions do you have for the new senior leader? (e.g., What are your goals for the directorate?)
- What are your concerns about him/her becoming the director?
- What is going well that you would like to keep?
- What is not going well that you would like to change?
- What do you need from the new senior leader to allow this organization to be even more effective?
- At the end of this meeting, directorate personnel are asked to complete a brief biographical worksheet soliciting professional and personal information (or updates, if this has been completed previously), to be relayed to the incoming senior leader.

Third, the leader-team integration session occurs. The transition facilitator begins by presenting the incoming senior leader's "questions to the directorate" to the team. The directorate personnel discuss and formulate responses to the incoming leader's questions, with a facilitator on hand to record responses. Meanwhile, the incoming leader independently prepares his/her responses to the team's questions. All then meet together for a two hour dialogue, aided by the facilitator. The facilitator begins by conveying the team's overall answers/messages and then questions to the leader. The leader comments and communicates his/her key messages to the team, and describes how he/she plans to address concerns raised by personnel. Before concluding this meeting, both the leader and the directorate personnel identify future issues to be addressed.[5]

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[4] Note that an alternative to this face-to-face meeting is for directorate personnel to submit their answers to the transition facilitator's questions in writing.

[5] The benefits of having the facilitator actively involved in the leader-team integration session dialogue should be evaluated in the context of the organization's culture. It is possible that in some organizations, reliance on a facilitator during this process may be viewed negatively. That is, in some cultures, having an external party facilitate this meeting may undermine the authority of the incoming senior leader, whom subordinates expect to be

Leader-peer integration exercises are also scheduled no later than the first 30-60 days. This is an opportunity for the incoming senior leader to network with peers, seek advice and guidance if desired, and learn about norms within the organization. This is also an opportunity for peers to learn about the incoming senior leader's background, operating style, and priorities, allowing them to build an initial working relationship with the incoming senior leader. The leader-peer integration process involves three steps. First, the transition facilitator meets individually with the senior leader. The facilitator describes the process, selects discussion questions, and explores particular issues and concerns by asking the senior leader questions such as:

- What would you like your new peers to know about you?
- What would you like to know about your new peers?
- Provide a summary of your personal and work history that others might not know.
- What are you interested in outside of work?

Second, the transition facilitator meets with the peers (without the senior leader) to solicit answers to questions such as:

- What advice do you have for this new director?
- How would you describe HQCOM's written and unwritten rules?
- What would you like your new peer to know about HQCOM?
- The things that make a person successful at HQCOM include ____?
- The things that can derail a person at HQCOM include ____?
- The things that help a person successfully integrate into HQCOM include ____?
- What can you tell your new peer about each director's operating style?
- In addition, the transition facilitator also gathers, from each member of the peer group, information on their areas of competence, where they might serve as a resource to the new senior leader, their interests outside of work, and the names of their spouse and children, if applicable. This information is recorded on index cards for the incoming senior leader.

Third, the leader-peer integration session occurs. This begins with a short overview by the transition facilitator, who sets the objectives of the session and asks everyone to introduce themselves. Next, the incoming senior leader separates from the peer group. The peer group and incoming senior leader gather responses to each others' questions in separate rooms, with each side's responses recorded on flip charts. All participants then reconvene for a facilitated discussion to share responses and engage in general dialogue.[6]

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skilled at independently "working the group," getting key messages across, and endearing himself/herself to the people – without the aid of a third party.
[6] In general, there should be some very specific objectives and take-aways from both the leader-team and the leader-peer integration sessions. At the same time, it is important not to overly codify these meetings or stifle impromptu discussions which may benefit all involved.

Three to Four Months In

Three-four months after the incoming senior leader's arrival, a second 360 leader review is conducted. The leader provides self ratings and is also rated by selected peers, all direct reports, direct reports' subordinates, and his/her boss. Whereas the first 360 leader review solicited input from the leader's former associates, this one surveys current personnel working with and for the leader. The timing of this 360 is believed to be of the utmost importance (Conger & Fishel, 2007). Prior to the three to four month mark, raters do not know the leader well enough to provide a valid assessment. Moreover, leaders may not be confident enough in their new role to respond positively to their feedback. However, delaying feedback to the six month mark or later can also be problematic. It does not take long for a senior leader to develop a negative reputation, which is often seen by others, but not by the senior leader him/herself (Scully, 2007). By the six month mark, the leader's behavior has often become stereotyped by subordinates and peers. After six months, it can be difficult to escape the stereotype.

At the outset of this 360 leader review, the transition facilitator meets with the senior leader to review the survey instrument and to give the senior leader the opportunity to add items (closed or open-ended) pertaining to specific issues upon which he/she wants feedback. Other open-ended items may also be added to the 360 leader review, such as the following:

- What are your initial impressions of this incoming leader's strengths?
- What are the potential landmines/obstacles that he/she may come up against?
- What advice would you give to the new leader to be even more effective and to accelerate performance in the role?
- To increase effectiveness, what does this individual need to (a) continue doing, (b) stop doing, and (c) start doing?

After the transition facilitator meets with the leader to go over the instrument, the 360 leader review is initiated. The transition facilitator gathers the data and creates feedback reports. Again, ratings are anonymous, and only the feedback facilitator and the incoming senior leader have access to the data and reports, to encourage candid responses from the raters. Once the reports have been produced, the transition facilitator meets with the incoming senior leader to review the results. The development plan (goals) constructed after the first 360 leader review are revisited and modified if needed to incorporate the new feedback received. The transition facilitator and the senior leader hold brief follow-up meetings during the ensuing months to review progress toward goals.

The One-Year Mark

The onboarding process concludes, one year after the incoming senior leader's arrival, with a final 360 leader review. This provides the leader with additional feedback and an opportunity to see if change efforts are working as intended.

The final 360 includes a few extra "onboarding scorecard" questions which ask respondents to assess the onboarding process and provide recommendations for improving the

program.[7] Responses to the scorecard questions are important because they enable a formative evaluation, allowing the organization to tweak the onboarding process as needed for ongoing improvement. Questions/items vary depending on the survey respondent's role in the onboarding process. Individuals are asked to evaluate things like:

- Overall quality of the onboarding program.
- Value of different aspects of program (e.g., Senior Leader Transition Guide; initial 360; meeting with subordinates, etc.)
- How well did the onboarding program prepare the individual for his/her new role?
- How well did the onboarding program help to manage the expectations-reality gap?

Summative Evaluation

Prior to initiating the senior leader onboarding program described above, HQCOM developed a comprehensive, summative, program evaluation plan (i.e., a plan to determine whether the program addresses the challenges and deficiencies uncovered during the needs assessment conducted at the outset of this initiative). Once a sufficient number of leaders have been onboarded, HQCOM intends to implement this evaluation, which addresses the following types of questions:

- Have the program objectives been met?
- Is onboarding easing senior leaders' transition into HQCOM?
- Is it increasing their cultural awareness and organizational aptitude?
- Is the onboarding program reducing the time needed to reach the "breakeven point," at which incoming senior leaders become net contributors of value to the organization?

Costs and Benefits

As clearly indicated above, senior leader onboarding is a time- and resource intensive proposition which requires a significant commitment from many individuals. In order to bring this process to fruition, peers, direct reports, predecessors, bosses, key network members, and incoming senior leaders in particular must devote a substantial amount of time to the effort. Moreover, considerable resources are needed to involve high-quality transition facilitators, who are critical to onboarding success.

Considering the Costs in Context

In determining whether and how onboarding should be implemented, these and other costs should be weighed against the expected volume of incoming senior leaders, the time currently spent integrating senior leaders in the absence of an onboarding program, and the distribution of the proposed onboarding program's workload across incumbent personnel. With regard to volume, historical data should be examined to project how many incoming senior

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[7] Organizations should strongly consider administering this scorecard even if they do not choose to include a final 12-month 360 feedback survey in their onboarding schedule.

leaders are expected to transition through this program annually. Assuming this program is targeted to high-level leaders (e.g., incoming directors), the volume may be relatively low.

It should also be noted that although each onboarding cycle requires nontrivial time commitments from those involved, the arrival of an incoming senior leader already places considerable pressure on the system, even in the absence of an onboarding program, as incumbents field questions and help the leader get established and form connections (albeit in a more casual and less predictable manner). While the implementation of an onboarding program requires time commitments from key individuals, it may also free personnel from other burdens as the Transition Guide and facilitator address questions and dilemmas that may otherwise fall on the shoulders of (sometimes busy, expensive, high-level) incumbents.

Finally, it is important to recognize that the particular individuals tapped to assist with the onboarding effort likely vary from one incoming leader to the next (e.g., different subordinates, different network members). The onboarding workload is therefore somewhat distributed. That is, in most cases, the same individuals are not asked for time and input every time a new leader is brought in. However, certain key incumbents are undoubtedly tapped more often than others.

The consequences of senior leadership errors and the anticipated benefits of effective and efficient integration also affect the cost/benefit equation of interest when projecting the utility of an onboarding program. A review of the research literature and popular press suggests that a number of private and public sector organizations see value in devoting substantial resources to acclimating executives and senior leaders, viewing extensive onboarding exercises, such as those described earlier, as an investment. As one article plainly states, "It is cheap when compared with the costs that arise when a new boss goes overboard" (That tricky first 100 days, 2006). Wells (2005) similarly argues that resources devoted to senior leader onboarding are well spent, especially after factoring in the indirect costs of poor senior leader integration, such as lost opportunities, business delays, and damage to relationships with personnel inside and outside of the organization. Meanwhile, a study in the private sector reports that return on investment from executive coaching is almost six times the initial cost of purchasing coaching services. When asked about the impact of coaching on themselves and the workplace, most executives from Fortune 1000 companies surveyed by Right Management Consultants pointed to improved productivity as well as intangible benefits such as better relationships with subordinates and supervisors, and more teamwork among employees (Lewis, 2004).

In effect, the argument is that the significant consequences of error and benefits of success at senior levels of the organization warrant a substantial commitment to onboarding. Under the right circumstances, a well-designed onboarding program is believed to have the capacity to more than "pay for itself" by helping leaders dodge costly mistakes and realize early successes which can trigger the types of individual, group, and organizational gains described next.

Individual, Group, and Organizational Benefits

   Senior leader knowledge accrual. Onboarding is designed to facilitate the transmission of information that leaders need to operate within the organization's culture (Conger & Benjamin, 1999). It is expected to increase incoming leaders' knowledge of various aspects of themselves, their role, and the organization, including:

- The organization's vision, mission, and values.
- The organization's culture.
- Unwritten norms.
- Long-standing rules of thumb.
- Customs and expectations about how to interact with colleagues, superiors, subordinates, and outsiders.
- Role demands.
- Standards and expectations for performance.
- How one's own behaviors and decisions affect, and are affected by, other individuals and contingents within and outside of the organization.
- Which relationships "matter;" that is, which relationships will influence the ability to perform effectively and move initiatives forward.
- What is rewarded by the organization.
- How one's own leadership style is perceived by others (i.e., self-awareness).

   Senior leader relationship/network development. Incoming senior leaders may well have the interpersonal and leadership skills needed, but upon arrival, they lack the understanding to successfully tap the organizational network. Onboarding is expected to increase the effectiveness and efficiency with which incoming senior leaders develop professional networks. This allows them to develop a sufficient amount of influence with people in the organization who can help make things happen (Fritz & Vonderfecht, 2007). These networks, in turn, can be leveraged to enhance the leader, team, and organization's performance by encouraging collaboration and exchange of information as appropriate.

   Senior leader skill acquisition. Onboarding is expected to enhance incoming leaders' skills, in addition to their knowledge base and professional network. For example, increased self-awareness and information about role demands should help them adjust their leadership tone and behaviors to the new role. In addition, knowledge gain pertaining to the organization's culture, norms, and values should help leaders further refine and adapt their behaviors and strategies to the new setting, ensuring congruence with their new organizational culture. Finally, the professional network built through onboarding should aid skill development as well, helping senior leaders become facile at navigating the organization.

   Senior leader effectiveness. The knowledge, skills, and relationships developed during onboarding can help pre-empt senior leader missteps, speed up the learning curve, and increase overall effectiveness. The possibility of senior leader derailment is minimized via (a) the provision of information to help identify hurdles early on, (b) coaching and advice on how to successfully address these hurdles, and (c) 360 feedback, strategically timed to act as an early warning sign to pre-empt leadership failures. These and other aspects of onboarding help

prevent the incoming leader's talents from getting lost due to early interpersonal or strategic mistakes which can limit subsequent effectiveness.

Importantly, the benefits of an effective onboarding program go beyond error prevention. Onboarding should also set incoming leaders up for success by helping them ramp up more quickly. That is, it speeds up the learning curve, accelerating acquisition of the knowledge, skills, and relationships necessary to step into a new senior leadership role. Leaders who are rapidly onboarded can generate value quicker than those who follow a slower or more casual orientation path, reaching the breakeven point sooner than they would in the absence of onboarding (Johnson, 2005).

Senior leader job satisfaction. Onboarding can help incoming senior leaders fit more naturally into the existing leadership structure and act in accordance with others' expectations. This can reduce some of the anxiety and confusion incoming senior leaders experience as they move into unfamiliar roles (Conger & Benjamin, 1999). Related to this, one of the goals and benefits of onboarding explicitly identified by Bayer (2004) was increased job satisfaction.

Climate benefits. How well and how quickly senior leaders assimilate affect not only the senior leader him/herself, but also other personnel throughout the organization (Brodie, 2006). Senior leaders create a context that shapes the choices and behaviors of other leaders and personnel (Conger & Fishel, 2007). This, in turn, impacts command climate. As noted by Jones (2003), the key to a healthy work climate is senior leadership. This is noteworthy, given the empirical link between quality of climate and unit productivity in both commercial and military settings (Jones, 2003).

Development of critical organizational initiatives. According to Conger and Benjamin (1999), one of the reasons leaders require socialization is to prevent them from disrupting ongoing strategies or upsetting existing social relations. To avoid rehashing past debates, incoming leaders must be educated about the history and rationale behind the organization's values and strategies. Armed with the organizational aptitude needed to develop sound strategy, incoming leaders are prepared to concentrate their efforts in the most fruitful directions possible. To this end, Bayer (2004) identified the "focused identification and implementation of critical organizational initiatives" as one of the goals/benefits expected to be realized by a senior leader onboarding program for Department of Defense civilians. Meanwhile, Cashman and Smye (2007) argue that onboarding enables incoming senior leaders to "keep an astute focus on which problems are best to pursue as 'early wins' and which items are more likely to upset the momentum" (p. 5).

An important organizational side-benefit of senior leader onboarding has to do with the onboarding process itself. In all likelihood, senior leaders who are successfully onboarded will serve as future resources or network members for subsequent leaders who enter the organization. To the extent that their onboarding experiences are positive, these leaders can be expected to later contribute effectively to the onboarding program, resulting in a self-improving process where buy-in, support, and enthusiasm from key network members increases steadily over time.

Culture benefits. A final organization-level benefit worth emphasizing concerns the organizational culture. Explicitly teaching culture to incoming senior leaders can help reinforce the values the organization wishes to ingrain, potentially helping the organization shape and strengthen desired cultural attributes, while extinguishing or minimizing unwanted norms and values.

Process for Developing an Army Onboarding Program

Given the uniqueness of the Army culture in general, and various Army subcultures in particular, the direct adoption and implementation of a mainstream onboarding program developed in a non-military environment is strongly discouraged. Instead, onboarding should be tailored to the particular characteristics and requirements of the organization in question. As suggested earlier, this necessitates a systematic needs assessment, as well as a method for collecting data to evaluate and adjust the program, once implemented (Bayer, 2004). In particular, the following steps are recommended in order to develop a senior leader onboarding program for an Army organization.

1. Determine whether the organization is ready to lend the considerable support, time, and effort needed to develop and implement a senior leader onboarding program. Support and buy-in from the organization, especially top leaders, are critical to the success of an onboarding initiative.

2. Determine who will be in charge of (a) the development and (b) the administration of this program.

    - Many senior leader onboarding programs in the private sector are outsourced to external firms (All aboard, 2007; Onboarding coaches, 2002). However, the construction of an Army onboarding program needs to be clearly rooted in the military culture, which may be difficult for some external firms to fully grasp.[8] Given the uniqueness of Army subcultures and the need for cultural competence throughout this process, outsourcing the development of this program to an external firm lacking military experience is not advisable. One way to help ensure a culturally-informed process is to develop and later manage senior leader onboarding in-house.
    - Ideally, this process would fall under the purview of a directorate or staff element designed to focus specifically on Organizational Development (OD), leadership development, or related functions.

3. Establish a liaison team, consisting of selected subject matter experts (SMEs), who will be asked to review and provide feedback on findings and materials as they emerge. If possible, SMEs should consist of high-performing senior leaders as well as individuals currently involved in the administration of the organization's orientation for senior leaders (e.g., key members of the G-1).

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[8] See the reference list for the citation on the following article for a discussion on the need for cultural competence when working in an Army setting.

4. Determine what the onboarding program will be called.

   - Note that the label assigned to the program is believed by some to affect the ease of "selling" the idea and gaining buy-in from those involved (Wells, 2005). At present, the term "onboarding" is commonplace. Sometimes, this term is used to refer to a less-intensive program for integrating employees at all levels. Other times, it is used to refer to more extensive efforts specifically targeted to executives and senior leaders, such as those described in this report. Overall, the appropriateness of this term has been debated somewhat. According to Wells (2005), some view "onboarding" as a mere orientation, whereas the term "integration" is believed to do a better job conveying the longer-term, strategic issues of interest. Some prefer "alignment," and others propose "transition" as a more suitable term (Wells, 2005). Additional alternatives include assimilation, acculturation, and socialization. At present, "onboarding" appears to be the term most commonly used.

5. Define "senior leader." To which levels of leadership will this program apply?

6. Project the volume of incoming senior leaders expected to transition through this program annually, once it is established. Track data from the past few years to determine how many individuals would have gone through the program, if it had been in place. This will help determine the cost of onboarding to the organization.

7. Review the literature describing private- and public-sector best practices and recommendations related to senior leader onboarding. (See the example "HQCOM" onboarding program description provided in this report, as well as the reference list at the end of this paper.)

8. Develop a list of key transition requirements and deficiencies characteristic of senior leaders coming into the organization.

   - Develop a protocol for conducting semi-structured interviews and focus groups with current (and, if possible, former) senior leaders to identify knowledge and skill requirements for incoming senior leaders, as well as the problems and deficiencies routinely encountered, especially during the transition period. For example, ask about any political minefields that new senior leaders need to maneuver and determine what important questions are usually difficult for incoming senior leaders to answer.
   - Carry out interviews and focus groups. Conduct a thematic analysis of the responses to help determine transition challenges commonly faced by incoming senior leaders.
   - Consider collecting critical incidents from both senior leaders and others (e.g., subordinates), requiring respondents to use a structured format to relay anecdotes about past senior leader transition problems and successes. Conduct a thematic analysis of these critical incidents to help determine transition difficulties encountered by senior leaders coming into the organization.

9. Circulate the ensuing list of key transition competency requirements and deficiencies to the liaison team for review and feedback. Revise and re-circulate until the group reaches consensus on the accuracy and comprehensiveness of the list.

10. Write down the specific goals, objectives, and outcomes that the onboarding program will aim to achieve. These should follow closely from the list of critical transition competencies developed above.

11. Conduct a systematic review of the orientation and leader development programs currently in place for senior officers within the organization. Determine what programs are available, which ones are commonly attended, when they occur, who is responsible for conducting them, and what content/competencies each program teaches.

12. Compare the critical transition competencies (from the list above) to the content currently being taught during orientation.

    - Create a matrix to identify which critical transition competencies (from the list above) are and are not being addressed by the programs currently in place. The idea is to avoid wasting incoming senior leaders' time and organizational resources with new onboarding exercises that duplicate other efforts. The goal, instead, is to create an onboarding program that incorporates, leverages, builds upon, complements, and reinforces valuable information being taught elsewhere.
    - Also identify areas, if any, where senior leaders are currently being required to attend orientation events that do not teach useful things (i.e., those that do not align with the critical transition competencies uncovered above). Communicate these findings to decision makers.

13. Devise a draft program description/schedule, using the goals/objectives described above as a guide for outlining appropriate onboarding exercises.
    - Incorporate learning opportunities currently in place, where appropriate.
    - See the example HQCOM program description provided in this report for additional exercises and activities to consider. As noted earlier, each and every exercise described in this paper may not be appropriate for the organization at hand. When selecting new onboarding exercises and activities to add, choose only program components which address clear and important needs/deficiencies. Do not proceed with program components which teach things that (a) incoming leaders already know, (b) incoming leaders will pick up quickly/efficiently regardless of whether it is covered in onboarding, or (c) incoming leaders do not need to know.
    - Establish a timeline for the onboarding exercises and activities to be included in the program.

14. Circulate the draft program description/schedule to the liaison team for review and feedback. Revise and re-circulate as often as needed to achieve a satisfactory plan.

15. Develop a plan for collecting formative and summative evaluation data for continuous process improvement and assessment of whether the program, once implemented, meets the goals and objectives it was designed to address.

16. Develop the materials (e.g., description of the organization's culture, Senior Leader Transition Guide prototype, leader-team integration exercise protocol, etc.) needed to implement the program.

17. Circulate the draft materials to selected SMEs for review and feedback. Revise and re-circulate as often as needed to achieve a satisfactory outcome.

18. Consider having a Six Sigma or other specialist examine the entire program to determine whether tracking software and other tools might increase the efficiency and effectiveness of its implementation.

19. Pilot test the onboarding program with a few incoming senior leaders. Let them know the organization expects to make changes and refine. Ask for feedback.

20. Evaluate the pilot test. Revise the program as necessary.

21. Implement the revised onboarding program.

22. Conduct ongoing evaluations and revise if/as necessary.

Conclusion

Compared to most non-military organizations, senior leadership transitions in the military are relatively predictable and frequent. Paradoxically, however, the military is seemingly behind the curve when it comes to integrating senior leaders into new organizations. This shortcoming is felt in the Army, where the assimilation of incoming senior leaders currently occurs in a relatively non-systematic fashion, resulting in inefficiencies and avoidable mistakes. The development and implementation of a senior leader onboarding program is recommended in order to help incoming leaders quickly "get up to speed," learn their new organization's subculture, adjust to their roles, cultivate critical networks of relationships, and generally develop the organizational aptitude needed to perform their jobs effectively. A well-developed onboarding program (informed by needs assessment and program evaluation data) is expected to result in a number of key benefits to individual leaders, their teams, and the Army overall.

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